

Shelter Checklist

- **Self-Sufficient Out Come All Adult Clients (18 yrs & Older):**
 - At Intake into Program
 - Annual Progress Report (APR) clients must be done every year (if client stays over a year).
 - Case Manage Client must be done Quarterly.
 - At Exit from Program
- **Client Consent (All Clients regardless of Age):**
 - Every client needs have client consent form; if they refuse to sign it you still must note that in the system.
 - For children under age the guardian, parent can sign for the child.
 - The expiration date is 7 yrs from the date the client signed it, please put this date in MetSYS.
- **Case Status Point Assessment (All Clients regardless of Age):**
 - At Intake into Program
 - Annual Progress Report (APR) clients must have one done every year (if client stays over a year).
 - Case Manage Clients must be done Quarterly
 - Eat Exit from Program
- **Placement into Shelter:**
 - Every client, this means all family members must be placed into Housing Service.
 - Even if the service is Motel/Hotel Vouchers all clients must have a placement.
 - If Clients stays past their original stay time frame than a new placement into Shelter/Housing must be done.
- **Placement into Services:**
 - Clients receiving these services
 - Services will have to be added to the clients record when they receive them this might mean updating the clients record several times.
- **Family Services:**
 - Everyone in the family who'll be benefiting from the service (ie food box) will need to have placement in that service.

Intake

Form/Task Completed by:	Form/Task	Client Type
Client	Application Form	All Clients (regardless of Age)
Client	Client Consent Form	All Clients (regardless of Age)
*CM w/ Client Present	Case Status Point Assessment	All Clients (regardless of Age)
*CM w/ Client Present	Self- Sufficient Out Comes	All Adult APR, Case Manage Clients
Case Manager	Placement into Shelter	All Clients (regardless of Age)
Case Manager	Placement into Services	Clients that are receiving that services

*Case Manager

During Stay

Form/Task Completed by:	Form/Task	Client Type
*CM w/ Client Present	Case Status Point Assessment	All Clients (regardless of Age)
*CM w/ Client Present	Self- Sufficient Out Comes	All Adult APR, and Case Manage Clients
Case Manager	Placement into Services	Clients that are receiving that service during their stay

Exiting

Form/Task Completed by:	Form/Task	Client Type
*CM w/ Client Present	Exit Application	All Clients (regardless of Age)
*CM w/ Client Present	Case Status Point Status	All Clients (regardless of Age)
*CM w/ Client Present	Self- Sufficient Out Comes	All Adult APR, and Case Manage Clients
Case Manager	All Services have correct end Date	All Clients
Case Manager	All Shelter Future Reservations have been cancelled*	All Clients

* This will be taken care of in the exit process on the screen 'Linked Services'. Make sure your Shelter service is check marked and all other services not checked when you hit "Selective" button. This will put the exit date as the end date and cancel all future reservations for you shelter placement.